

COMMISSIONER OF POLITICAL PRACTICES  
1205 Eighth Avenue  
Post Office Box 202401  
Helena, MT 59620-2401  
TELEPHONE: 406-444-2942  
FAX NUMBER: 406-444-1643  
WEBSITE: [www.politicalpractices.mt.gov](http://www.politicalpractices.mt.gov)



## INSTRUCTIONS (Revised 4/05) FORM L-5A LOBBYING FINANCIAL REPORT

### WHO IS REQUIRED TO FILE A FORM L-5A?

A Principal who makes payments or has agreed to make payments exceeding \$2,200 in calendar year 2005 to one or more individuals for the purpose of promoting, opposing, or modifying the introduction or enactment of legislation on behalf of the Principal must complete and file a Form L-5A. All payments made to support or assist lobbying activities also must be reported, whether the payments are made to registered lobbyists, other individuals engaged in lobbying activities, or support staff.

There are generally four categories of reportable activities. They are: (A) The lobbyist who must register because he/she is paid at least \$2,200 to lobby; (B) The individual who engages in lobbying activities but who does not have to register because he/she is not paid at least \$2,200 to lobby; (C) All support staff who are paid to support or assist a lobbying activity; and (D) Equipment, advertising, supplies, social expenditures and office space used and paid for by the Principal to support or assist lobbying activities.

### WHAT INFORMATION IS TO BE REPORTED?

The following information is required:

- reporting period for which the report is being submitted;
- name(s) of registered lobbyist(s) receiving payment(s) to promote, oppose, or modify the introduction or enactment of legislation and to support or assist lobbying activities on behalf of the Principal during the reporting period, and amount of payments to each registered lobbyist;
- date registered lobbyist will cease to represent the Principal;
- total amount paid to individuals, other than registered lobbyists, who are employed or retained to promote, oppose, or modify the introduction or enactment of legislation or to support or assist lobbying activities on behalf of the Principal;
- itemized expenses paid during the reporting period;
- each bill draft request, bill number, or legislative issue for which a major effort was exerted to promote, oppose, or modify the introduction or enactment of legislation;
- name of payer and amount of each earmarked contribution and membership fee of \$250 or more paid to the Principal for the purpose of promoting, opposing, or modifying the introduction or enactment of legislation; and
- name of payee and of beneficiary of each payment of \$25 or more to the benefit of any public official and \$100 or more to the benefit of more than one public official as provided in Administrative Rules of Montana 44.12.209.

### WHEN MUST A FORM L-5A BE FILED?

An initial report must be filed for the reporting period in which:

- a) payments to lobby or to support or assist lobbying activities that exceed \$2,200 are made; or
- b) an oral or written agreement is entered into to pay one or more individuals more than \$2,200 to promote, oppose, or modify the introduction or enactment of legislation or to support or assist lobbying activities on behalf of the Principal.

### WHERE MUST A FORM L-5A BE FILED?

- One copy is to be filed with the Commissioner of Political Practices. **The report may be faxed provided the original report is submitted to the Commissioner immediately thereafter.**
- One copy is to be retained for three (3) years by the Principal. A Principal must also retain all records relied upon to prepare the L-5A.

The information on Form L-5A is required in accordance with Montana Code Annotated 5-7-208, 5-7-212; and Administrative Rules of Montana 44.10.202.